COVID-19 Community Team Outreach Tool
The Person Functionality in CCTO

A new functionality has been introduced to CCTO to generate person records, which are used to link monitoring events for the same individual. In light of the recent surge, this update has been designed to work smoothly with existing workflows and minimize disruption. See below for a full description of changes and impact.

Monitoring Events & Person Records

- A **monitoring event (ME)**, formerly called a contact profile, is the record on which contact or case monitoring takes place. Each ME is now associated with a **person record**, which has a unique P# identifier and helps you to see all of an individual's MEs in one place.
- **Person records** display a snapshot of an individual's basic info and list all their MEs in one place. They are stored in a new tab called **People**.
- Because person records help to link an individual's monitoring events, **the previous cloning and connecting processes for handling multiple monitoring events are no longer necessary and have been removed from the system.** *(As a result, Event # is no longer present and any records previously created through cloning have been assigned a unique C#.)* See p.6 for info about what to do instead.

See the graphic below for an illustration of how a person record fits into CCTO.

Person Record

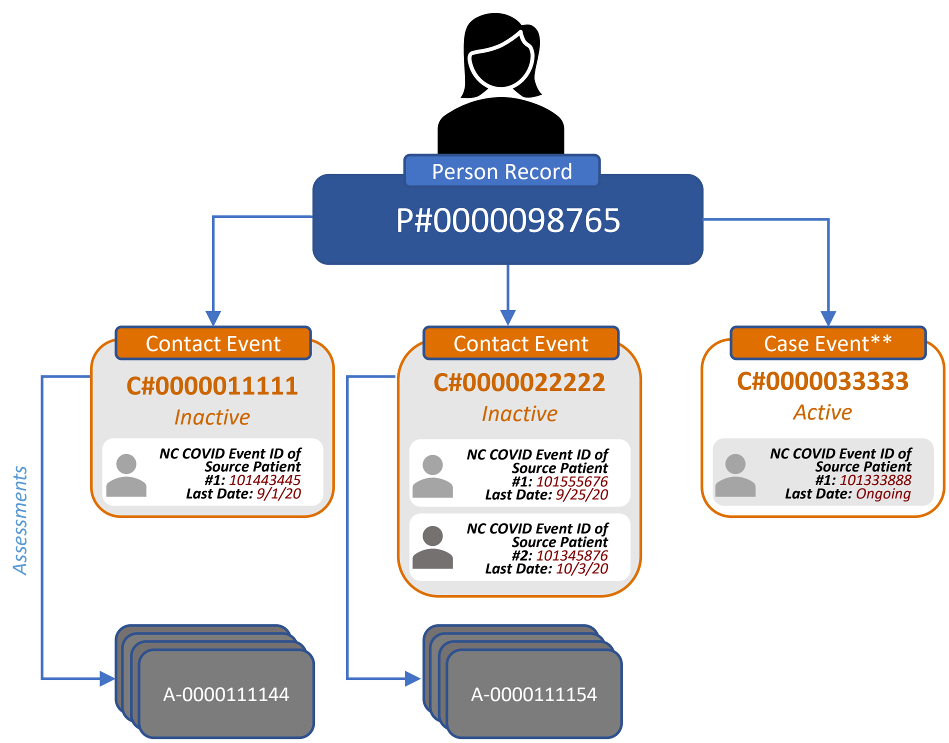
Holds P#, a unique identifier that attaches to each monitoring event for the individual.

Monitoring Events

Records with the same P# but unique C#s.* Each represents a unique monitoring period for the same person.

Activities & Assessments

Same as always!



**Events now have unique C#s. Event #s are no longer necessary, but Legacy Event #s and Legacy C#s can be viewed in system information.*
***Shown as example – it is still not required to monitor cases within CCTO!*

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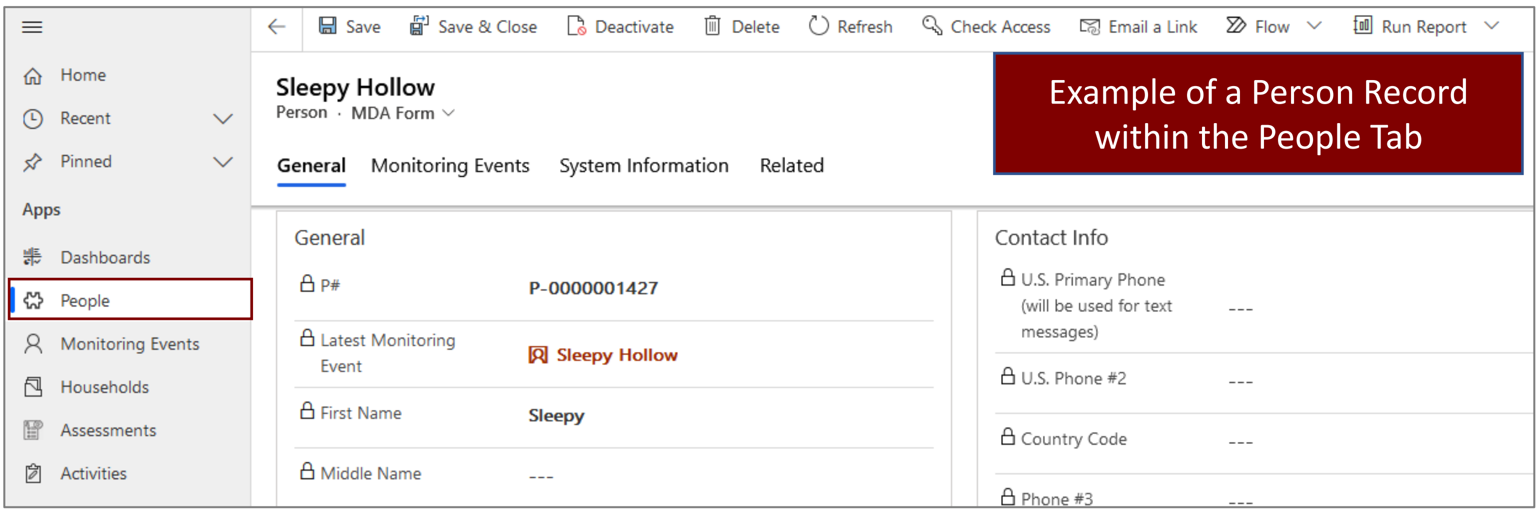
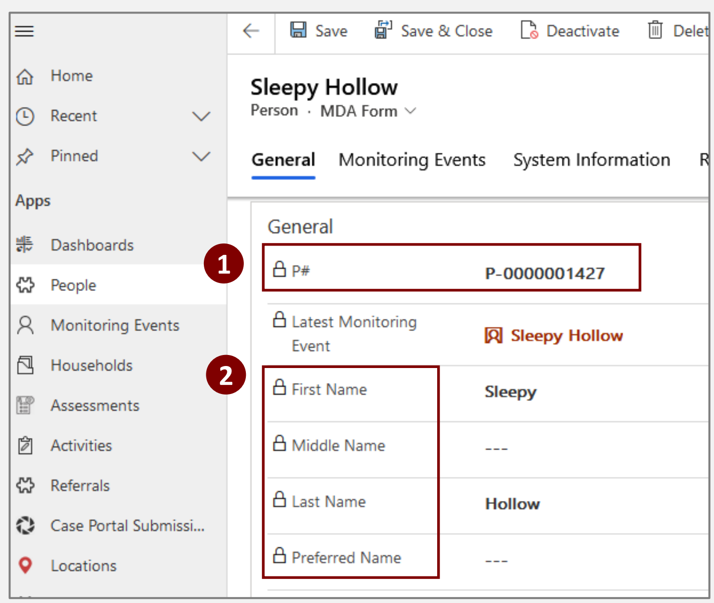
Understanding Person Records

- **What is a person record?** A person record **1) displays all of the monitoring events (MEs) associated with a particular individual** and **2) provides a locked snapshot of their basic information.** Each individual who has one or more MEs within CCTO should have one unique person record.
- **How is a person record created?** A new person record is generated when a new ME is created for someone who does not currently exist within CCTO. When new MEs are created for individuals who already exist within CCTO, they are attached to an existing person record. *See p.4 for details on how a new person record is created or how an existing ME is associated with a person record.*



Information Found on a Person Record

1. The **P#** (Person #) field is a unique, automatically generated person identifier. This provides a unique identifier for each individual, replacing the old functionality of a C#. *(C#s are now used as the unique identifier for each monitoring event; therefore, Event #s are no longer necessary. Legacy C# and Event #s can be viewed on the System Information page.)*
2. Person records display locked fields with a snapshot of the individual's basic information. This is pulled from the most recent ME to have the **Sync to Person Record?** field set to "Yes," which happens automatically when a record is edited or manually created (*see* p.5).



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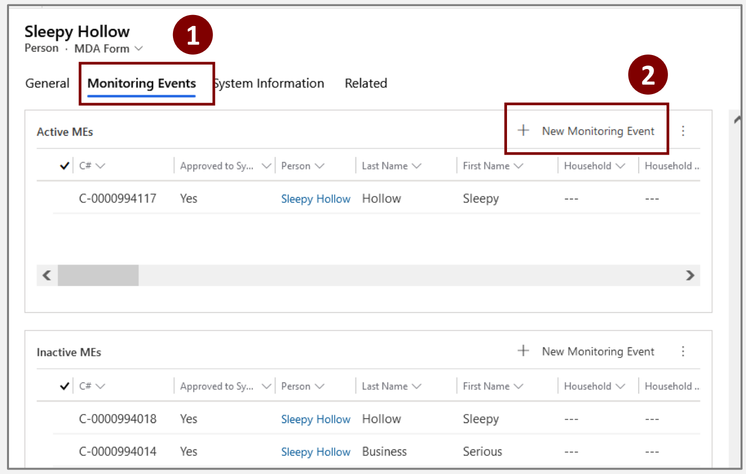
Using Person Records to See an Individual's Monitoring Events

1. The ***Monitoring Events*** page within a person record displays a list of each active and inactive ME that has been associated with this individual's person record.

2. You can create a new monitoring event for this individual *(previously done through cloning – see p.6)* by clicking the **+ New Monitoring Event** button on the top right of this page. This will create a new ME that is automatically associated with this person record and that has basic information pre-populated. **Remember that if this person already has an active ME you can update this event to include any new information and should not create a duplicate event.**

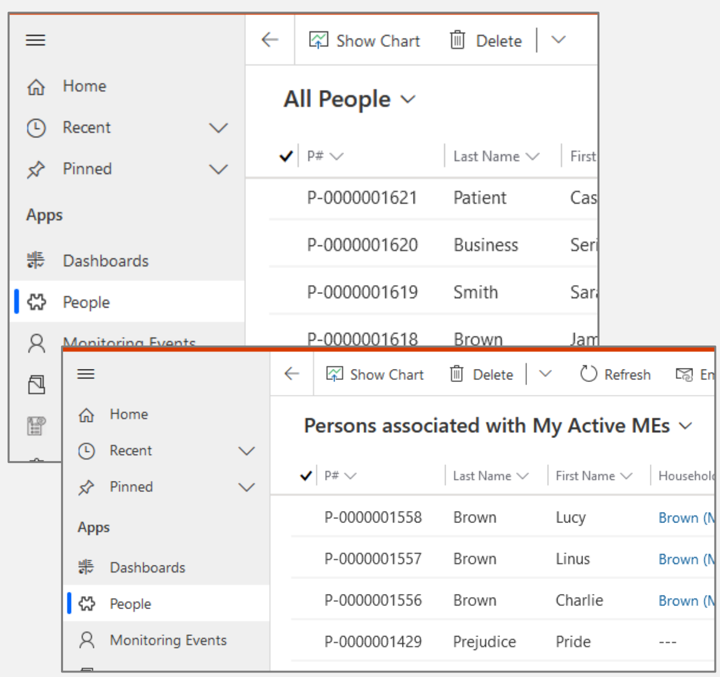


Using the People Tab

Finding Person Records Using Views

The People Tab contains default views for **All People, Persons Associated with Active MEs,** and **Persons Associated with My Active MEs.**

Because person records are not used for monitoring, they are not marked as active or inactive. To help you find a person who is currently being monitored, you may choose to use the **Persons Associated with Active MEs** or the **Persons Associated with My Active MEs** views.



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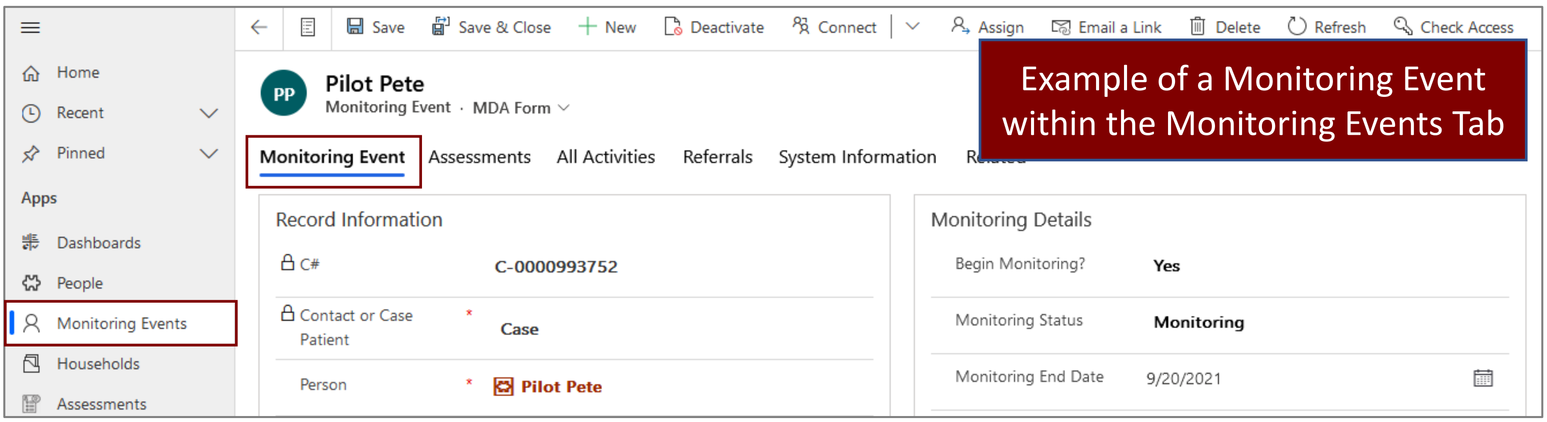
Associating Monitoring Events With Person Records

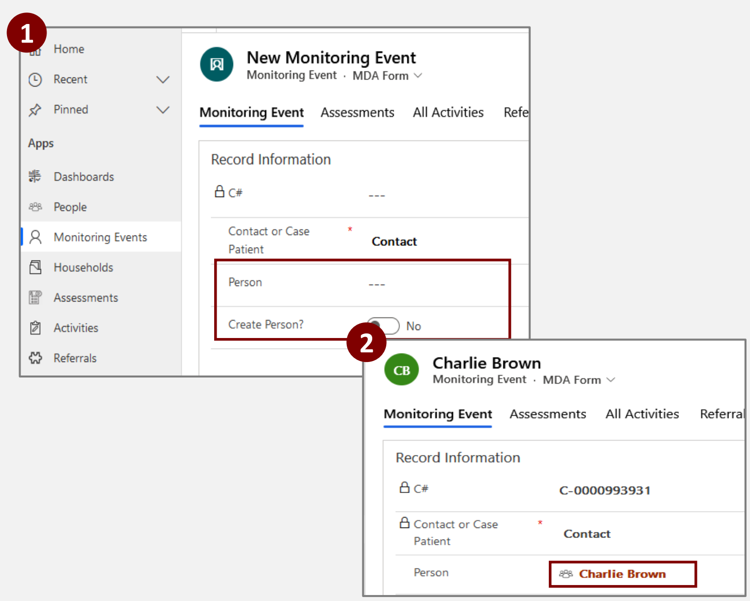
- **What is a monitoring event?** Monitoring events (MEs), formerly also called contact or case profiles, are the records on which case or contact monitoring takes place. Each ME has a unique C#. *In the most recent CCTO update, all instances of the word "contact" were replaced with "monitoring event."*
- **How do they relate to person records?** Each ME is associated with a person record (see p.2), which lists all MEs for an individual, holds a snapshot of their basic info, and provides a P#**.** When a new ME is created and the "Person" and "Create Person?" fields are blank, the system will automatically look for a matching person and either **1)** associate the ME to an existing person record if a match is found or **2)** create a new a person record for the ME if no matching person is found.



Associating Monitoring Events with Person Records

1. When you create a new ME, there will be a **Person** field and a **Create Person?** toggle. If you search the system and identify the person associated with this ME, enter them in the **Person** field. **If you do not identify a match, leave Person blank and do NOT turn on Create Person?.** The system will automatically look for a matching monitoring event* when the record is saved and **1)** associate the current ME with the person record of the matching ME OR **2)** create a new person record for this ME as appropriate. ***A duplicate warning will appear if a person match is found – this is okay! Proceed with saving as long as you are not duplicating an active ME.***

2. This process may take a few minutes, and you should refresh your screen to verify the associated person record. **You can then proceed as normal with assignment and monitoring.**



The system uses these sets of criteria to look for a matching person record:

- First Name, Email
- First Name, Last Name, DOB
- First Name, Phone
- Phone, DOB

Note that the system will also search for matching person records for events from NC COVID and the case patient portal.

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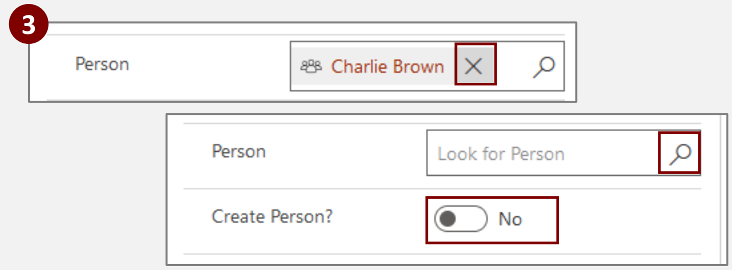
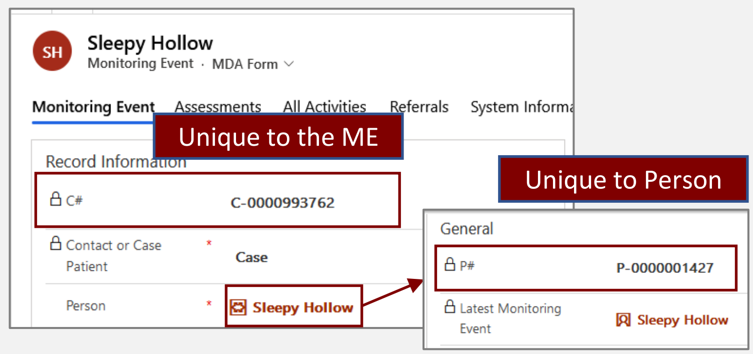
3. If the person record identified automatically by the system is incorrect, clear out the **Person** field by clicking “x.” Then:
   - Search and select the correct existing record within the **Person** field **OR**
   - Set **Create Person?** to “Yes” right away* to create a new person record upon saving. ***This is the only scenario in which you should use this toggle.***



***If you need to create a new person record and you do not turn Create Person? to “Yes” immediately, the system will auto-save and rematch the ME with the person record that was deleted.** Update the toggle quickly to avoid this issue.

Understanding P# and C#

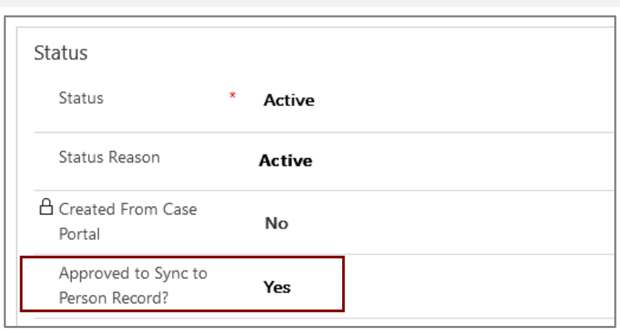
Each person record has a unique **P#** identifier to mark an individual within CCTO. Due to this, the **C#** field on MEs now describes a unique identifier for an ME, **NOT** an individual. **Therefore, the previous Event # field is no longer necessary, and any records previously created through cloning (which had shared C#s) have been assigned a unique C#.** (*The legacy Event # and C# fields can be found on System Information page.)*



Syncing Person Records and the “Approved to Sync to Person Record?” Field

- The locked basic info displayed on a person record is a snapshot of the most recent monitoring event that has been ***synced*** to the person record. (**First** and **Last Name** fields will not update when a new ME is synced. If you require this change, please reach out to an admin* or the help desk.)
- CCTO automatically syncs a person record with the most recently created ME whose **Approved to Sync to Person Record?** field *(found in the System Information page)* was set to “Yes.” **Each time a new ME is created manually within CCTO, this toggle is set to ”Yes” and the person record will sync to it automatically**; however, records from NC COVID and the case patient portal will be set to “No.”
- If an ME should be synced to a person record, you can manually change the toggle from “No” to “Yes.” Editing an ME will also automatically sync it to the associated person record.

****Admins ONLY:*** *To update the name shown on a person record, use the Admin Form to update the First Name, Last Name, AND Full Name (Record Label) fields. See final page for details.*



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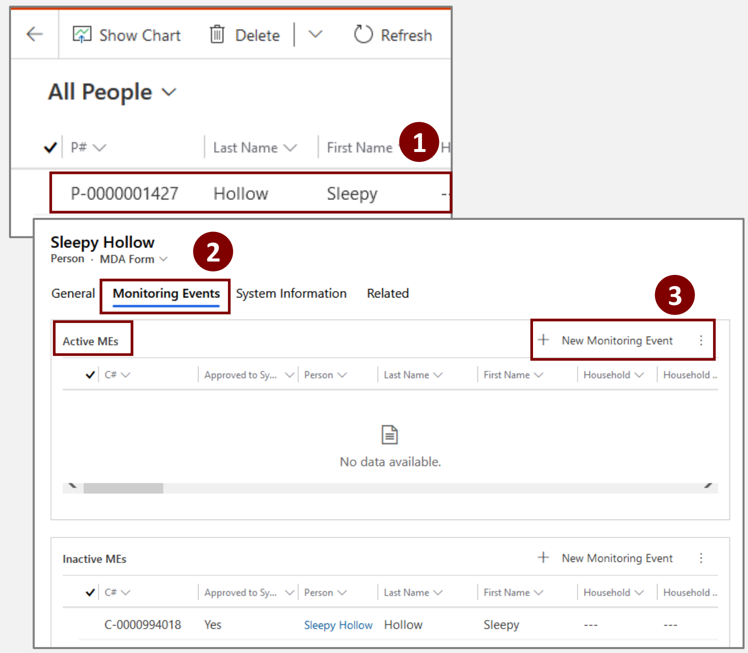
Handling Multiple Monitoring Events Using Person Records

Creating a New Monitoring Event for an Existing Individual (*formerly done by “cloning”)*

1. Search for this person within the People Tab and click on their person record.

2. Within the person’s Monitoring Events page, confirm that they do not already have an active ME in the “Active MEs” box.

3. Click **+New Monitoring Event** to create a new monitoring event for this individual. The individual’s basic information will be pre-populated on the new ME, and it will automatically be linked to their person record. This replaces the previous cloning functionality. ***Proceed with assignment and monitoring as normal; no further action is required.***



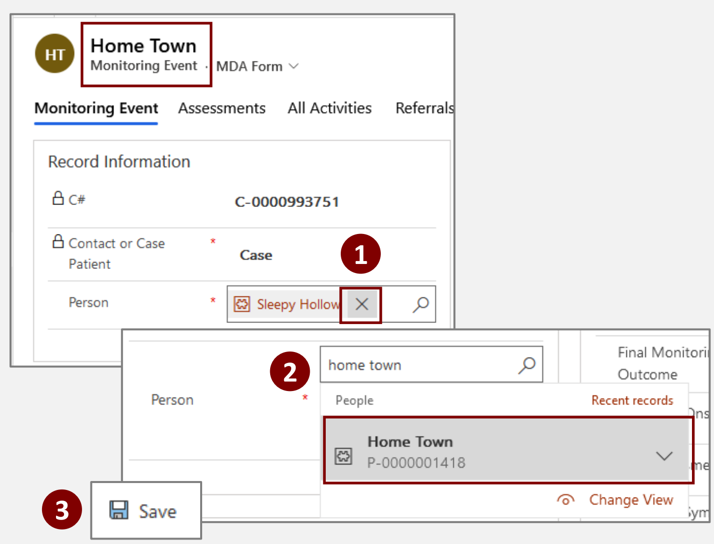
Linking Active & Inactive Monitoring Events for Same Individual (*formerly done by “connecting”)**

1. Visit the **Person** field within the active or inactive ME that is not associated with the correct person record. Click “x” to remove the incorrect person record.

2. Search and select the appropriate person record to which this ME should be linked.

3. When you are finished, save your work. The ME is now linked to the correct person record.

**As with connecting, this process only applies to non-concurrent MEs. If a contact is being actively monitored in more than one place, you should follow deduplication processes.*



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FOR ADMINS ONLY

Please note that the **First Name** and **Last Name** on a person record do not update when a new monitoring event is synced and will instead reflect the first monitoring event that created the person.

To update the name listed on a record, admins should access the Admin form and update the **First Name,** and **Last Name** AND **Full Name (Record Label)** fields.